



One state. One system.

User Community Forum

September 2017



Will Padilla

FI\$Cal Change Management Office

September 2017

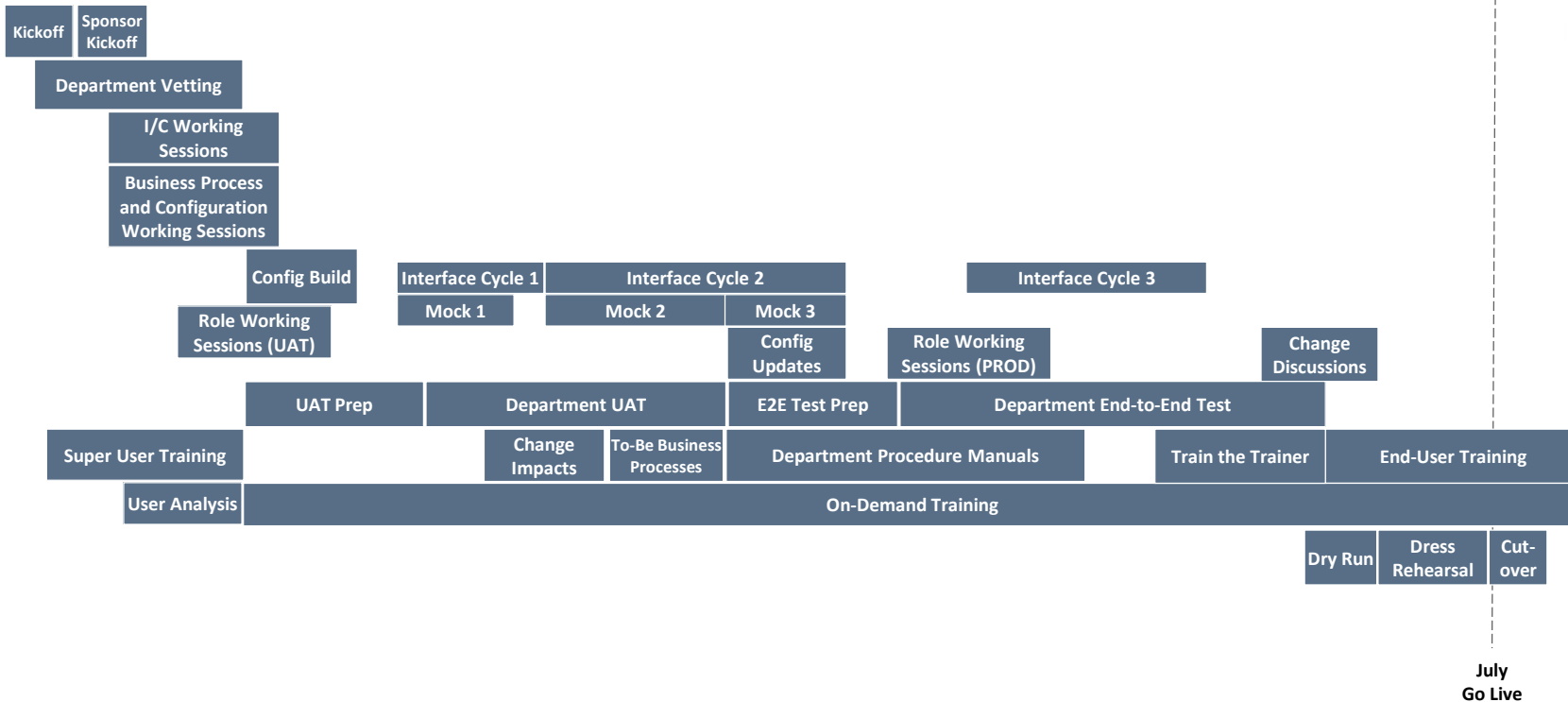
Agenda

- 2018 Release Update
- Change Management
- Job Aids and User Support Labs
- FI\$Cal Service Center
- Close

KEY IMPLEMENTATION ACTIVITIES

July '17	August '17	Sept '17	Oct '17	Nov '17	Dec '17	Jan '18	Feb '18	March '18	April '18	May '18	June '18	July '18
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NORMAL PRODUCTION PATH



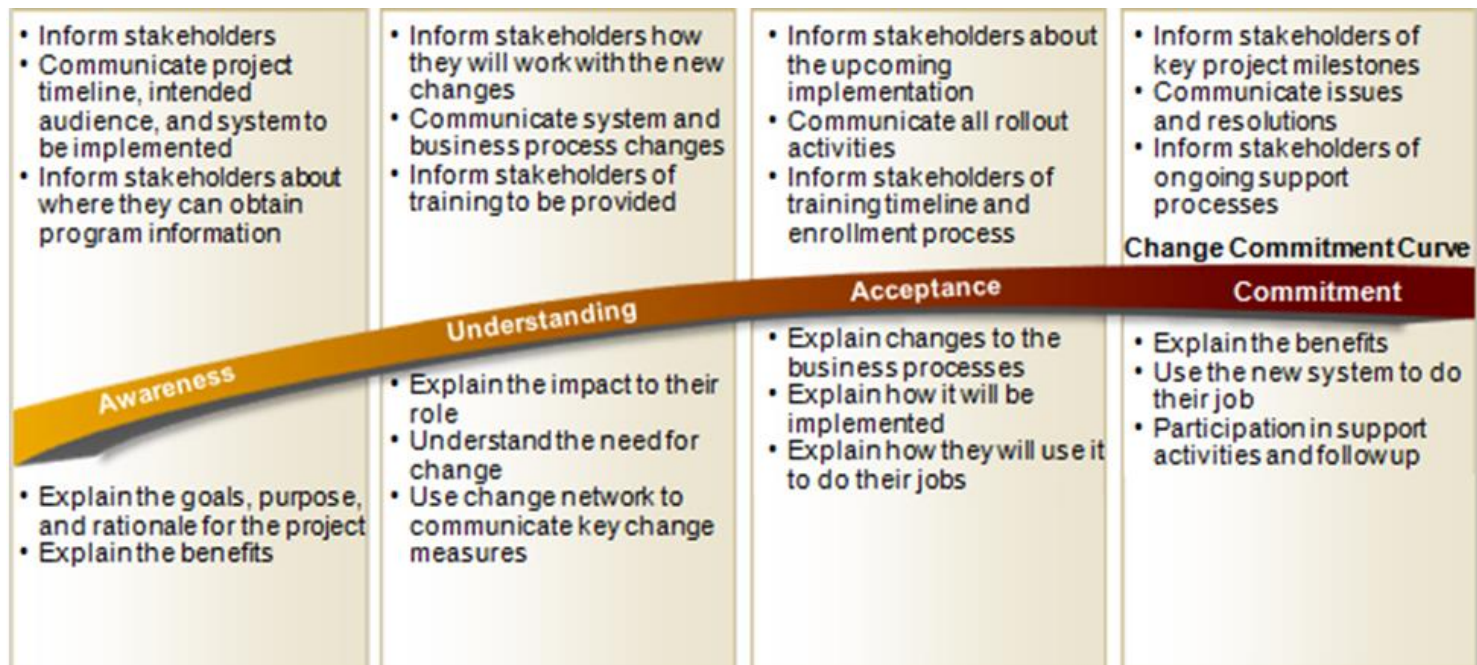
July
Go Live

2018 Release Update

- Done or in progress:
 - Department Vetting
 - Interface/Conversion Working Sessions
 - Business Process and Configuration Working Sessions
 - Role Mapping Working Sessions
- Upcoming:
 - Interface Cycle 1/Mock 1
 - Department UAT
- Ongoing:
 - Training

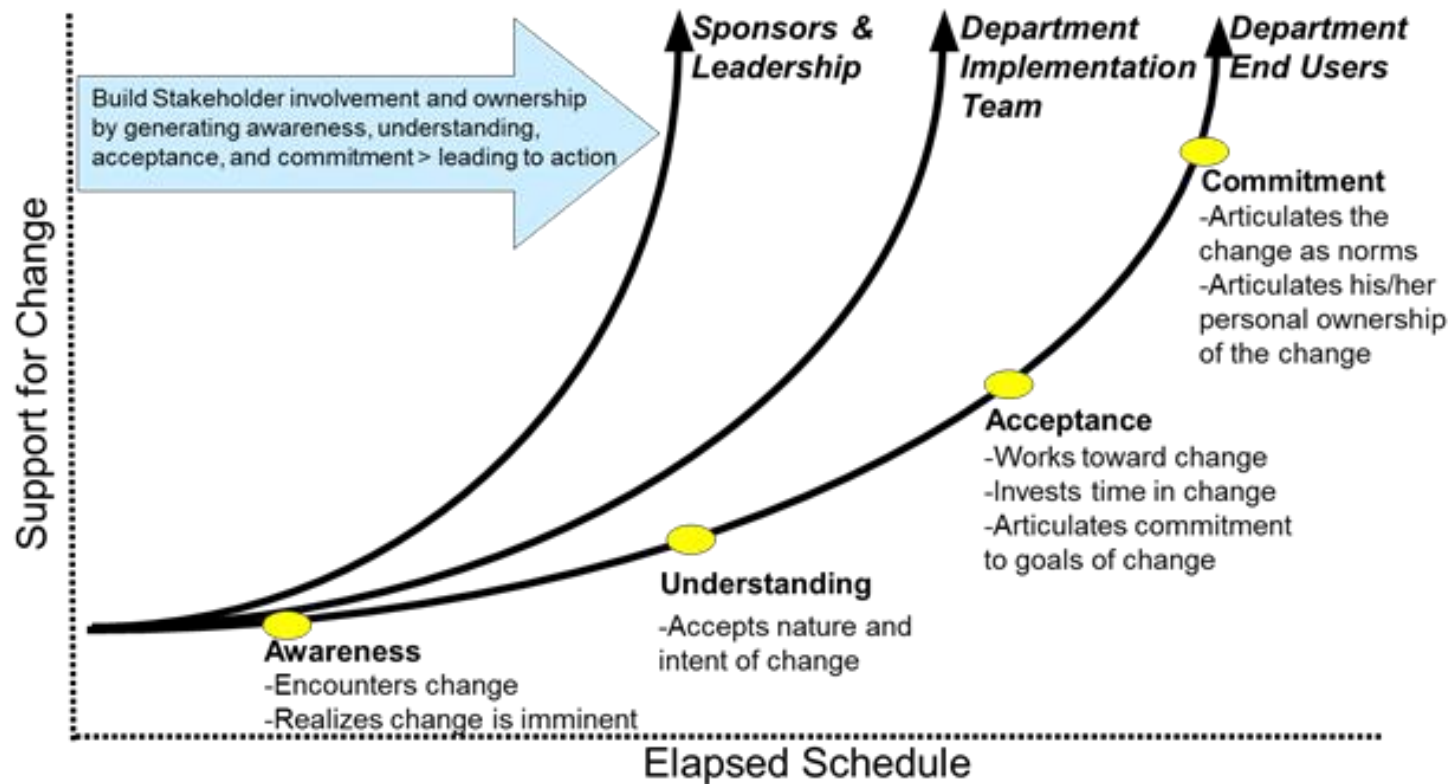
Change Management

• Commitment Curve



Change Management

- Awareness: Encountering the change and realizing its imminence
- Understanding: Comprehending the nature of the change and its impact
- Acceptance: Expressing a willingness to perform as the change requires
- Commitment: Demonstrating a personal ownership and endorsement of the change.



Anthony Ampania

University of FI\$Cal

September 2017

2017 User Support Labs

- Began July 25, 2017
- One department (1) Super User (Super User **is required** to attend and must have completed the required training)
- Up to three (3) additional end users who have ***completed the required training***
- 11 Departments have participated to date
- **Note:** Required training must be completed for each USL participant prior to submitting the USL Request Form

Future USLs

Year round beginning October 3, 2017

Topic	Day of Week	Hours
PO/AP	Tuesday	9:00 AM – 12:00 PM 1:00 PM – 4:00 PM
AR/BI/CM/PC	Wednesday	9:00 AM – 12:00 PM 1:00 PM – 4:00 PM
GL/COA	Thursday	9:00 AM – 12:00 PM 1:00 PM – 4:00 PM
Open Session	Monday/Friday	9:00 AM – 12:00 PM 1:00 PM – 4:00 PM

Job Aids

- Supplemental Job Aids are end user training resources communicating step-by-step instructions on how to complete specific transactions in FI\$Cal not covered in the University of FI\$Cal. FI\$Cal Training Tips include *FI\$Cal End User Frequently Asked Questions* and helpful *FI\$Cal End User Tips and Tricks* for navigating in the System.

New Job Aids

- **FI\$Cal.345** – Purchase Order FAQs, Version 1.0
- **FI\$Cal.346** – P-Card FAQs, Version 1.0
- **FI\$Cal.347** – Receiving FAQs, Version 1.0
- **FI\$Cal.348** – Requisition FAQs, Version 1.0
- **FI\$Cal.349** – Procurement Contract FAQs, Version 1.0

New Job Aids

- FI\$Cal.**350** – General Procurement Tips FAQs, Version 1.0
- FI\$Cal.**351** – Accounts Payable FAQs, Version 1.0
- FI\$Cal.**352** – Events/Solicitation (California State Contracts Register-CSCR) FAQs, Version 1.0
- FI\$Cal.**353** – State Contracting and Procurement Registration System (SCPRS) FAQs, Version 1.0
- FI\$Cal.**354** – Procurement Approval Workflow FAQs, Version 1.0

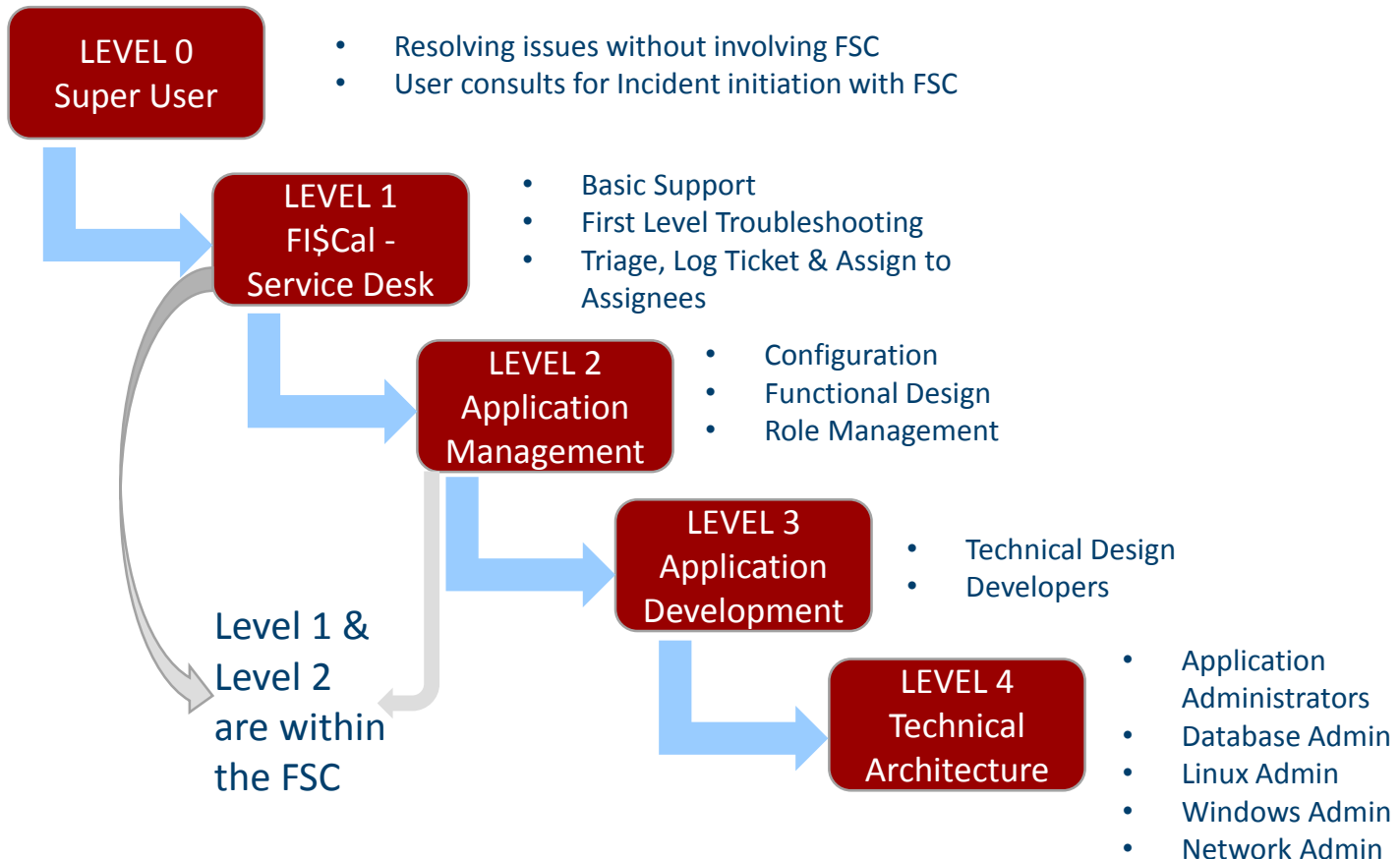
Maureen Rielley, FSC L1

Blanca Mendoza, FSC L1

Marlon Lewis, FSC L2

FI\$Cal Service Center

FI\$Cal – Structure and Services



FI\$Cal Service Center (FSC)

- Mission

To serve the best interest of the State and its citizens by providing excellent support and services to the FI\$Cal customers.

Customer Service & Analytics Section (FSC Level 1)

What we do...

- Your main point of contact for new issues and tickets
 - We will resolve the incident immediately if possible.
 - If we cannot, we perform the initial evaluation, triage and prioritization of incidents then route to the proper team(s)
- FSC Analytics and Reports
 - Daily, weekly, and monthly statistics, reports, and presentation decks
 - Analyze trends and triage critical issues

Contact Information

Email: fiscalservicecenter@fiscal.ca.gov

Voice: (855) FISCAL0 (347-2250)

Web: <http://www.fiscal.ca.gov/access-fiscal/>

FSC – Things to do, speed up resolution

- Advise user to clear cache and retry process (as part of incident triage)
- Contact your department Super User to attempt resolution
- Providing the following information speeds up incident processing:
 - Steps leading to the issue
 - FI\$Cal User ID (some Users have multiple ID's)
 - Relevant Screenshots – include URL; Menu Breadcrumbs; Date/Time
 - Affected User's Contact Information – recommend affected user be the customer contact on incident, not Super User
 - If Budget issue – identify whether in Hyperion or PeopleSoft
 - Provide BU & clear description of issue/request in email Subject Line
 - BU + MEC/YEC in email Subject Line for MEC/YEC requests
 - Possible Workarounds
 - Providing this information at incident creation reduces the time for L2 to request additional information for clarification and analysis

FSC – Data Privacy

Be Careful Sharing Data

- Do not share your login credentials with anyone
- Do not email sensitive or confidential data to FSC
- Consider what you are sending – ensure confidential data is not contained in a screenshot or image
- If your problem involves sensitive data, please call the FSC for assistance in redacting the data prior to submission
- Consider requesting a WebEx session which may speed up issue resolution

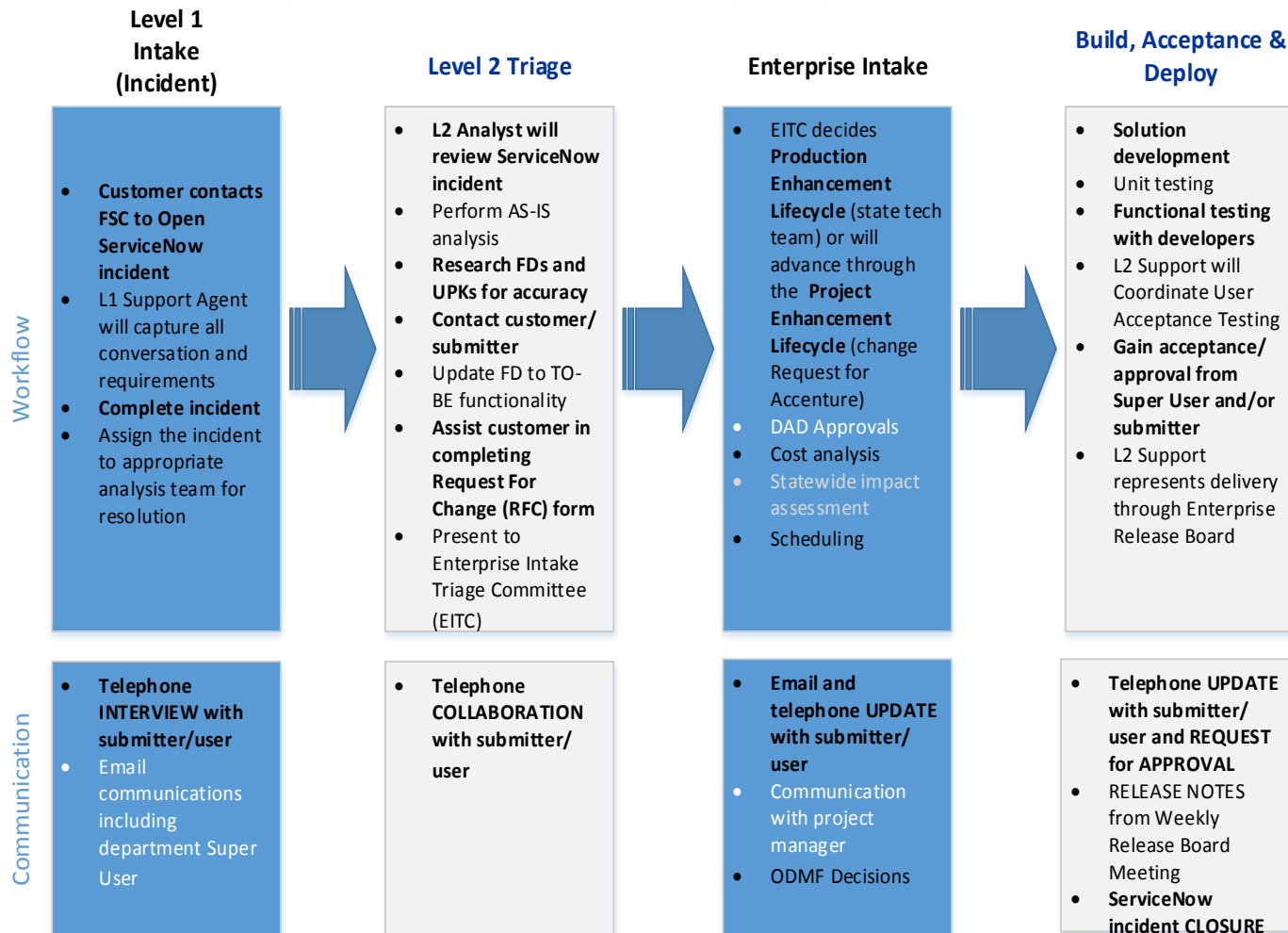
Business & Functional Services Section (FSC Level 2)

What we do...

Your team of analysts providing functional support

- We perform research of reported incident
 - We work with internal FI\$Cal service teams to determine if the system is functioning as designed, or to perform a fix to the system
 - If we determine that the request is not business function related, we triage with appropriate internal FI\$Cal service teams to resolve the incident
 - Keep open communication as we address your ticket
-
- Business Services
 - Assist with business services such as releasing vouchers within a stuck status
 - Assist with processes related to closing
 - Collaborate with internal FI\$Cal service teams to address MEC/YEC related tickets

System Enhancements (Change Request) Workflow





One state. One system.

Questions and Answers
FI\$Cal Project Information:

<http://www.fiscal.ca.gov/>

Or e-mail the FI\$Cal

Project Team at:

fiscal.cmo@fiscal.ca.gov

